



# SECTION 1

## QUALIFICATIONS AND EXPERIENCE

**Question 1a** Identify the legal structure of the firm or consortium of firms making the proposal. Identify the organizational structure for the project, the management approach and how each partner and major subcontractor in the structure fits into the overall team.

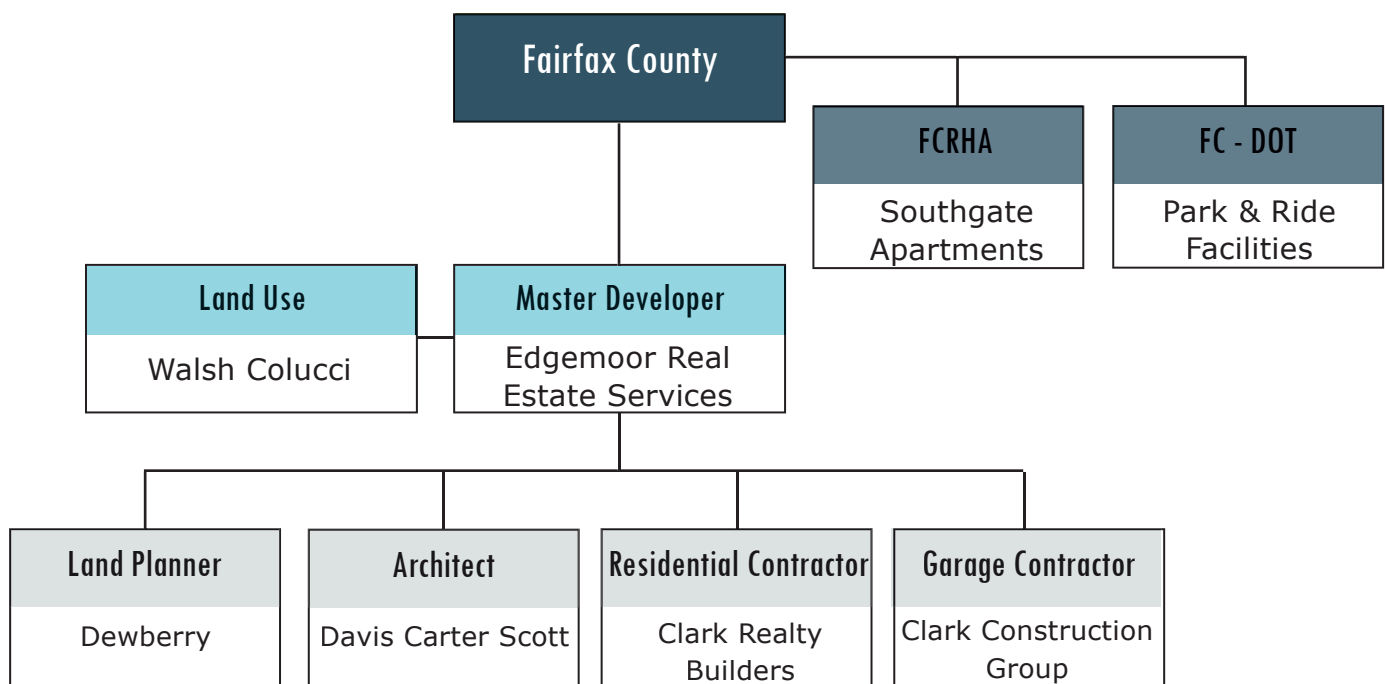
### Legal Structure

Edgemoor Real Estate Services, LLC, affiliated with the Clark Construction Group, will serve as the Development Manager for the turnkey development of workforce housing ("Southgate Apartments"), structured parking, bus transit facilities and transportation improvements as further described in Section 2 of this proposal. Edgemoor will in turn contract with Davis Carter Scott for the provision of design services and Clark for construction delivery.

Fairfax County Redevelopment and Housing Authority will own the workforce apartments upon project completion, while Fairfax County Department of Transportation will own the structured parking. At this time it is planned that the ownership and ongoing operation maintenance responsibilities for these County facilities will remain with the county. However, Edgemoor is pleased to include, as an alternate to the proposal describe herein, private ownership and ongoing operations and maintenance services as part of the scope of work to be included in our Comprehensive Agreement.

### Organizational Structure

Edgemoor has assembled a highly qualified, interdisciplinary team to participate in the development of the proposed County facilities and infrastructure improvements. Each team member has clearly defined responsibilities, as further shown on the following Team Organization Chart. Additional team members will be added during the PPEA Detailed Proposal Phase, as needed to address specific project planning needs.





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### Team Member Roles and Responsibilities

Firm Roles and Responsibilities	Parking Experience	Residential Experience	Experience Working Together	Public-Private Experience
<b>Edgemoor Real Estate Services</b> will serve as the Master Developer and will be responsible for the delivery of the entire project.	●	●	●	●
<b>Clark Construction Group/Clark Realty Builders</b> will serve as the General Contractor for the construction of the residential building and parking garage.	●	●	●	●
<b>Davis Carter Scott</b> will serve as the Master Architect and will be responsible for project management, planning, design, security, and building systems engineering.	●	●	●	●
<b>Dewberry</b> will serve as the Land Planner and will be responsible for site plan development.	●	●	●	●

### Working Relationships

Many of our team members have worked together on prior projects in Virginia and elsewhere around the country. In addition, all of our team members have had prior experience working in Fairfax County. These prior experiences reduce the risk to the county and ensure cooperative efforts among our team members.

- Clark has worked with Davis Carter Scott on eighteen projects;
- Clark/Shirley worked with Dewberry on twelve projects;
- Clark worked with Walsh Colucci Lubeley Emrich & Terpak on the South County High School PPP project;

### Management Approach

The development process of any complex project is a collaborative effort between many partners and stakeholders working together to achieve the same goal. Our goal is to deliver an attractive workforce housing development in a way that eliminates the project development risk, accelerates delivery, and guarantees the price.

To fully achieve the objectives of the County and of the Project, the Edgemoor Team proposes to lead a multi-phased Project Development process that includes Project Management, Planning, Design, Construction, and Finance. To ensure the critical and timely input of appropriate County stakeholders, Edgemoor proposes the formation of a County Advisory Committee to facilitate participation of County housing, transportation, planning, zoning, finance, procurement, and other key administrative offices. The Advisory Committee will meet regularly with the Edgemoor Team throughout the development of the project, and will be reconstituted over time as best meets the



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need of each project phase. This multi-disciplinary, teamed management approach, together with efficient internal and external communications, is the key to the successful implementation of the Project.

**Table 1.1 Project Development Phase Activities**

PROJECT DEVELOPMENT ACTIVITIES	
<b>Project Management</b>	<i>Edgemoor project leadership will ensure continual focus of all team members and stakeholders on the project milestones and ultimate goal achievement. By partnering with Clark Construction and DCS in this process, we will ensure integration of design and construction "best practices" into the planning, design, programming, and construction of the new facility.</i>
<b>Planning</b>	<i>Edgemoor will work with the County to maximize the value that this project will bring to the Reston Community and the citizens of Fairfax County. The team will not only devise the optimal physical solution for the County today, but also review how phasing and other techniques can give the County the flexibility to grow the scope of this project in the future.</i>
<b>Design</b>	<i>Edgemoor will facilitate necessary design charettes, including the Advisory Committee and others, in order to deliver a uniquely appropriate workforce housing project for the County. Additionally, Edgemoor will work with the Project design team throughout to ensure that the ultimate product is in keeping with both the vision of the County as well as the budgetary constraints. An important responsibility of this team will be integrating design goals with County approvals parameters, and ensuring that all necessary approvals are obtained.</i>
<b>Construction</b>	<i>Edgemoor will coordinate and manage a team of preconstruction estimators, project managers, and superintendents, construction support personnel, architects and engineers, and other corporate resources to meet the requirements of the project.</i>
<b>Finance</b>	<i>Edgemoor, in conjunction with the County's finance staff will determine the most appropriate financial structure for the project. All program and design decisions will be made recognizing the overall impact on the County's economics and budget goals. The goal is to minimize development, financial and construction risk to the County while maximizing the strategic value related to the project.</i>

A common focus that will be shared by all team members and subcontractors throughout all phases of Project implementation is our commitment to partnering, stakeholder engagement, and client satisfaction. Teamwork, cooperation and proactive problem solving are attributes that each Edgemoor team member will bring to the project every day. We are committed to the successful completion of this project and will utilize all means necessary to achieve this commitment.



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**Question 1b** Describe the experience of the firm or consortium of firms making the proposal and the key principals involved in the proposed project including experience with projects of comparable size and complexity. Describe the length of time in business, business experience, public sector experience and other engagements of the firm or consortium of firms. Include the identity of any firms that will provide design, construction, and completion guarantees and warranties and a description of such guarantees and warranties. Provide resumes of the key individuals who will be involved on the project.

Edgemoor Real Estate Services has assembled a highly-qualified, interdisciplinary project team to plan, design, and construct the Project. Edgemoor will serve as the Master Developer for the Project and will contract with various subcontractors, including members of the Project Team assembled for submission of this Conceptual Proposal, to provide the turnkey services needed to complete the development in the most expeditious and cost-effective manner.

Edgemoor's personnel possess over 30 years of real estate development experience. This includes significant experience in utilizing the innovative public-private development approach under the PPEA and PPTA legislation, including the Route 28 Corridor Improvements (Fairfax/Loudoun County), the South County High School (Fairfax County), and Mary Ellen Henderson Middle School (Falls Church) projects. Edgemoor's abilities and the resumes of its proposed team of managers are included later in this section. In addition to the experience Edgemoor brings to this project, the team members assembled are recognized industry leaders in their various fields. Collectively, they have the necessary experience and expertise to deliver this turnkey solution for the County of Fairfax.

### Overviews of the Firms

**Edgemoor**  
REAL ESTATE SERVICES

**Edgemoor Real Estate Services**  
*Master Developer*

Edgemoor personnel bring over 30 years of project development experience for the benefit of its public and private sector clients, allowing them to minimize the burden on management resources and manage risk in the development process while optimizing project functionality, aesthetics, cost, flexibility, and accountability. Edgemoor's development experience is broadly diversified by product type and size, geographic location, client objectives, and services provided. Their approach to project development is founded in common-sense analysis infused with innovation and attention to detail.

Edgemoor provides management expertise in the development role. Having participated in a number of transactions as a partner, Edgemoor appreciates the ownership risks of project development, and the group endeavors to manage each assignment with the client's interests and objectives driving the decision-making process.



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In prior public-private partnership projects, Edgemoor has offered clients an extensive range of management services that are tailored to meet each client's specific needs and objectives. We have highlighted below some of the services that could be appropriate for this project:

### **1. Feasibility and Site Acquisition**

- Site feasibility analysis including zoning impact, environmental due diligence, utility availability, grading analysis, and geotechnical studies;
- Site acquisition including contract negotiations; and
- Project feasibility analysis including comprehensive budget and scheduling of all activities.

### **2. Design**

- Qualification and selection of design consultants including architect, civil, structural, MEP, and geotechnical engineers as well as specialty consultants;
- Negotiation of fees and scope of services for design professionals, and management of designers throughout the development process; and
- Suggestion of alternative design approaches to reduce cost while maintaining design objectives (value engineering) in all phases of the work including grading, excavation, foundations, structure, mechanical and electrical, landscaping, infrastructure, and FF&E.

### **3. Construction**

- Development of preliminary budgets and schedules to assist in feasibility analysis;
- Development of detailed budgets and refined schedules during the design process to ensure conformance with established objectives; and
- Review of design documents during the schematic, design development, and construction document phases for cost, constructability, and schedule impacts.

### **4. Development Management**

- Development of overall and intermediate programmatic, schedule, and cost objectives for the project, and management of these items to successful completion;
- Organization of the development process including scheduling, prioritizing, and coordinating the weekly, monthly, and long-term activities of all development team members;
- Oversight to ensure that each service provider to the project provides highly-qualified personnel at appropriate times and manpower levels to execute their work in a superior manner;
- Acquisition of zoning, building permits, and other governmental approvals on behalf of the project:
- Fast-track rights-of-way acquisitions and public/private utility relocation;
- Maintenance of effective communication with the client regarding the progress of the project including required client actions; and
- Review and approval of invoices from vendors, and maintenance of accounting records in conformance with the project budget.



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### 5. **Financing and Equity Structures**

- Determination of viable sources and terms of construction and permanent financing;
- Review of finance/equity options, and suggestion of the appropriate financing structure and the types of debt financing to meet the client's objectives;
- Negotiation of the terms of debt funding and the necessary documentation related to such capital raising; and
- Acceleration of key activities to reduce project schedule while working within funding constraints.

Edgemoor provides management expertise in the broad development role as well as in the specific area of construction. Other areas of specific expertise that we can provide as appropriate to the project include environmental, traffic, legal, leasing, marketing, and property management services, which are contracted services provided by independent firms. Contracts with such outside firms can be between the and such firms, with Edgemoor acting as agent on behalf of the County. Alternatively, Edgemoor can offer the County the option of bundling some services such as architecture, engineering, and interior design under the Comprehensive Agreement.

### ***Previous PPTA/PPEA Experience***

Edgemoor/Clark executed a Comprehensive Agreement with VDOT in September 2002 for the Route 28 Corridor Improvements Project, the first PPTA project in the Northern Virginia region. Clark recently completed the construction of two public-private partnerships for K-12 schools in Virginia – one in Fairfax County for the South County High School, and the other in the City of Falls Church for the George Mason Middle School.



### **Clark Construction Group/Clark Realty Builders** *General Contractor*



Founded in 1906, the Clark organization includes several general contracting companies with specific capabilities ranging from heavy civil work to commercial and residential construction. Clark is one of the country's premier builders of multifamily apartments, military family housing, hotels, and senior living facilities. Clark provides high-quality, responsive service backed by a virtually unlimited bonding capacity and unsurpassed national resources.

### ***Residential Experience***

Clark is the nation's oldest and largest private general contractor and draws on the knowledge gained through building more than 50,000 housing units, and it's nearly 100 years of affiliated experience to turn good ideas into great places to live.





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For four consecutive years, Builder magazine has ranked Clark as one of the Top Ten Multifamily Builders nationally. In addition, Clark is recognized as a technology leader in the construction industry and has twice won the Constructech Magazine Gold Vision Award for excellence in technology innovation.

Each year, Clark constructs more than 4,000 housing units in cities across the United States. As a testament to Clark's company-wide commitment to delivering high quality projects on-time and on-budget, Clark residential's portfolio consists primarily of third-party contracts from repeat customers like Archstone Communities, Pritzker Residential, KSI Services, RST Development, Tri-Star Management, Bristol Development, and HS Management.

Clark's recent honors include:

- Project of the Year from Multifamily Executive magazine
- Affordable Housing Award of Excellence from the DCHFA
- Pillars of the Industry Awards from the NAHB Multifamily Council
- Builder's Choice Awards from Builder magazine
- Finest for Family Living Awards from the NVBIA

### ***Parking and Transportation Experience***

Clark has been serving the construction needs of the Washington Metropolitan area and public/transportation clients for nearly 100 years. In recent years, Clark has completed over 25 million square feet (SF) of parking structures, representing in excess of 100,000 parking spaces. Because Clark builds 95% of its projects in an urban environment, most projects feature a structured parking component either above or below grade. These parking structures utilize a variety of structural types, including cast-in-place concrete, post tensioned cast-in-place concrete or precast concrete structural components.

Through this experience, we have developed the systems, skilled staff and institutional knowledge that will ensure that the Fairfax County parking structure is delivered safely, at the highest level of quality, on time and on budget. Our team will develop a construction plan sensitive to the on-going operations, as we have successfully performed on past garage projects for transportation entities. Listed below are some of Clark's most notable parking structure projects.

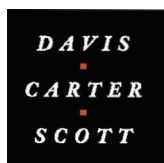
- WMATA Largo and Morgan Stations and Parking Deck
- Union Station Parking Garage Expansion
- Franconia-Springfield Metro Station Parking Garage
- Reston Town Center – N.W. Parking Garages
- Washingtonian Parking Garage
- BWI Airport Central Garage
- BWI Airport Garage Expansion
- Johns Hopkins University – McElderry Street Garage



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- Johns Hopkins University – South of Orleans Garage
- 414 Water Street Parking Garage



### **Davis Carter Scott** *Architect*

Founded in 1968, Davis Carter Scott (DCS) is a full-service architectural and interior architectural firm. DCS serves both a local and national clientele from two regional offices. The McLean, Virginia office maintains a professional staff of 67 and includes both architects and interior designers. The Washington, D.C. office accommodates an additional 20 interiors personnel.

Davis Carter Scott has provided land planning, architectural and interior architectural design services in the Commonwealth of Virginia for over 37 years. The firm provides innovative design services for universities, corporations, associations, regional governments, health care organizations, hotels, restaurants, and major developers throughout the area. DCS has proudly served some of the region's largest and most prestigious clients.

Because DCS is a local firm, and a committed partner with the region's corporate and economic development leaders, DCS staff understand the distinct needs of their clients in this area, and better serve them as a result. DCS' extensive repeat and referral business is testimony to that knowledge and experience.

Davis Carter Scott serves their clients through a team approach to both design and production. The firm is led by two Principals: Douglas N. Carter, AIA, and Lena I. Scott. Mr. Carter directs the base-building architecture division, and Ms. Scott is responsible for the interiors discipline.

Each principal is actively involved in and maintains a comprehensive understanding of each project within their division. Vice President Bella Schiro supports the Principals' in their vision and management of the firm, as well as the day-to-day operations and management of all projects.

DCS believes that they not only to serve their clients, but also act as their clients' advocate and representative throughout the duration of each project. They have assembled a staff of experienced professionals who lead clients through the complexities of the project to ensure, at every step, their true interests are being cared for and represented.

Each project is assigned a team. This team is led by a Project Director, and is assigned a core group of architects and designers skilled in programming, design, and production. The same team follows the project from commencement to move-in, ensuring the integrity of the design and continuity at all levels.





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DCS's clients benefit from their expertise and service in the following discipline areas:

- **Advance Planning**—DCS' goal is to assist clients in determining long-range goals through strategic planning, programming, and demographic analysis to pinpoint appropriate facility relocation, site search and analysis, and master planning.
- **Land Planning**—DCS assists their clients in maximizing utilization of a given piece of land with a focus on achieving functional needs, as well as addressing zoning, traffic, ecological and environmental issues.
- **Architecture**—DCS offers a range of services that extend from initial programming through schematic design and design development, to construction documents and administration.
- **Interior Architecture**—DCS' Interiors Division offers a range of services including: building evaluation, programming, space planning, design development, contract documents, cost estimates, furnishings selections and specifications, graphics, signage, engineering coordination and fine art selection.



Dewberry is a 1,600-person professional services firm operating nationally. The firm maintains 32 offices and provides services in program management, planning, engineering, architecture, surveying, geographic information services, and the environmental sciences. Clients include government agencies at all levels, corporations, real estate developers, colleges and universities, school districts, and other commercial and institutional organizations.

A privately held firm, Dewberry was established as a small land design and surveying practice in 1956 in Arlington, VA. In 1965, the office was relocated to Fairfax County, VA, where the headquarters remains today. Dewberry maintains a 200,000-square-foot complex along Arlington Boulevard in Fairfax, employing more than 800 people in this location.

Over time, the firm expanded upon its civil engineering and surveying expertise and added offices, now spread throughout a dozen states. Today, Dewberry is an *Engineering News Record* "Top 50" design firm, and ranks in the top 25 in several of *ENR's* market categories. The firm ranks as the second-largest engineering firm based in the Washington, DC area, according to the *Washington Business Journal*.



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### **Walsh, Colucci, Lubeley, Emrich & Terpak, P.C.** *Legal Consultant*

Walsh, Colucci, Lubeley, Emrich & Terpak, P.C is a diverse, mid-size civil practice, with wide-ranging emphasis in the practice areas of commercial real estate law and business law. They provide clients with thoughtful, sophisticated counsel, supported by a critical mass of resources and talent. Their celebrated clientele includes:

- National and local real estate developers of commercial and residential properties;
- Financial institutions;
- Hospitals;
- Title insurance companies; and
- A wide variety of local and regional businesses.

Case by case, client by client, they have built a reputation for in-depth expertise and responsiveness to client needs. Their firm's dynamic environment promotes exceptional service and communication, as principals and associates work side-by-side to better serve their clients. This close-knit atmosphere allows them to staff efficiently, deliver high quality service and consistently meet deadlines.

Walsh Colucci is strategically located, with substantial practices in the jurisdictions of Arlington, Fairfax, Alexandria, Loudoun and Prince William. Their attorneys are also working in the growth areas of Culpeper, Fauquier and Stafford Counties, offering an expanding array of client-oriented capabilities.

### **Guaranties and Warranties**

Edgemoor will guarantee all obligations assumed by it under the Comprehensive Agreement. In addition, Davis Carter Scott will provide appropriate professional liability insurance. The Clark Construction Group, LLC and Clark Realty Builders will guarantee the construction obligations. Warranties will be as provided in the American Institute of Architects' documents which will be supplemented by trade specific warranties as typically required on a project of this size and nature.

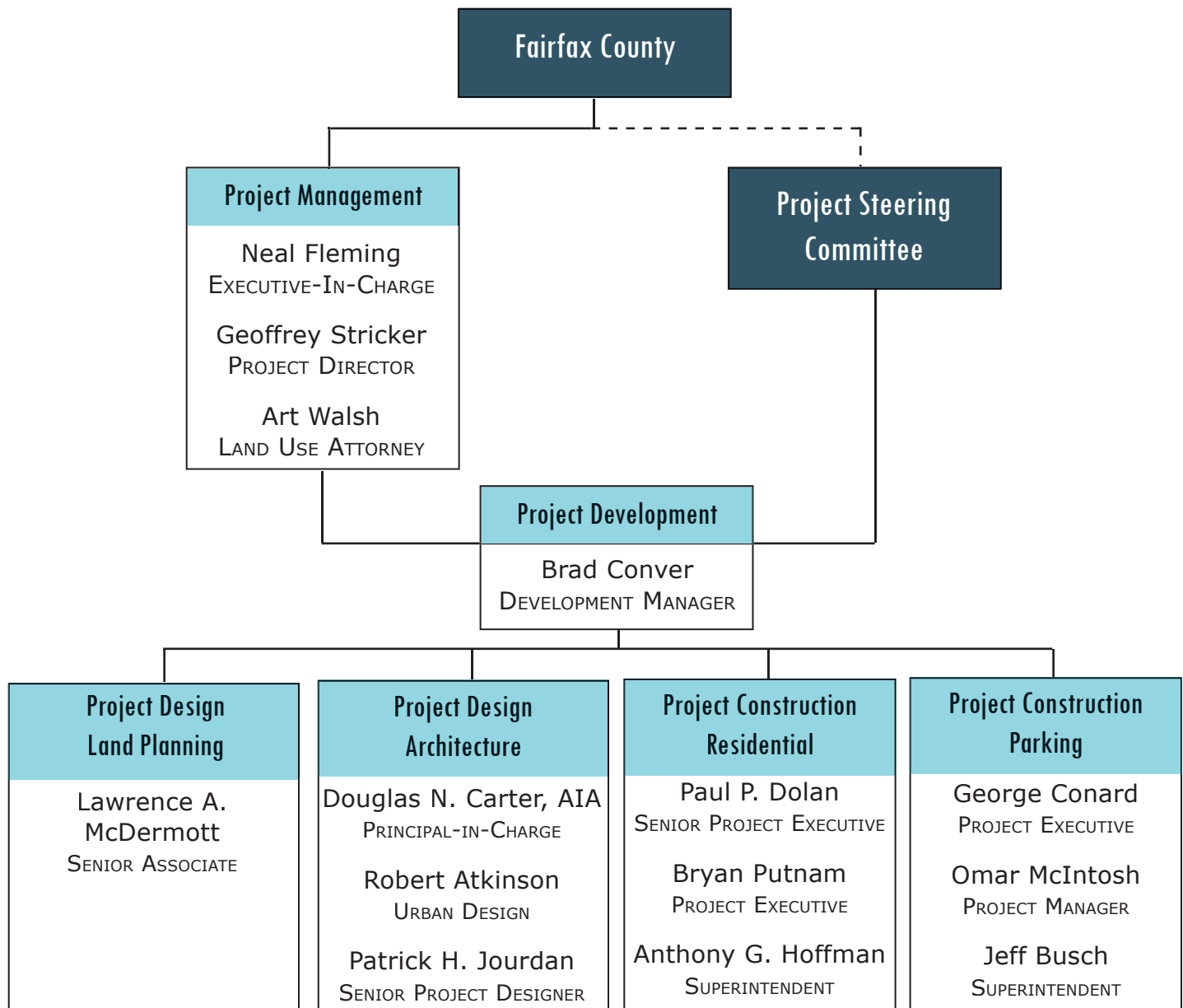
Following is a representative listing of the team's project experience.



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### Experience of Key Principals

Edgemoor has selected a highly qualified Team to deliver Reston Southgate to Fairfax County. The organization chart depicting the team composition and organization structure for the project is shown below. Resumes for each of the individuals shown are provided on the following pages.





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Question 1c Provide the names, addresses, and telephone numbers of persons within the firm or consortium of firms who may be contacted for further information.

Edgemoor has named the following individuals as the key team members for the Project, due to their successful record of accomplishment on projects of similar size and complexity. They possess an understanding of the County's desired program and have a reputation for working well with one another and their clients. Of most importance to this project is a unified project team with a passion to understand the goals and expectations of the County. Together, this project team will work with the County and consultants to successfully deliver the new facility.

The key principals, whose qualifications can be found in the response to Question 1b, include:

Mr. Neal Fleming  
Principal  
Edgemoor Real Estate Services  
7500 Old Georgetown Road  
Bethesda, MD 20814  
301.272.2999 (phone)  
301.272.1912 (fax)  
neal.fleming@edgemoorservices.com

Mr. Geoffrey Stricker  
Director  
Edgemoor Real Estate Services  
7500 Old Georgetown Road  
Bethesda, MD 20814  
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Mr. Brad Conver  
Development Manager  
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brad.conver@edgemoorservices.com



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Question 1d Provide a current or most recently audited financial statement of the firm or firms and each partner with an equity interest of twenty percent or greater.

Please see the FY 2004 Audited Balance Sheet for the Clark Construction Group, LLC, attached with Section 3 of this proposal.

Edgemoor is affiliated with Clark Construction Group, LLC. Clark Construction Group is a privately held company. Financial information, in the form of an audited balance sheet, is provided only with the original RFP response and is Confidential and Proprietary Information. We request that Fairfax County treat the information as such.



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Question 1e Identify any persons known to the private entity who would be obligated to disqualify themselves from participation in any transaction arising from or in connection to the project pursuant to The Virginia State and Local Government Conflict of Interest Act, Chapter 31 (Section 2.2-3100 et seq.) of Title 2.2.

No member of our Team would be obligated to disqualify themselves from participation in any transaction arising from or in connection with the proposal for a public-private partnership for the development, design, financing, and construction of the Development at Reston Southgate pursuant to The Virginia State and Local Government of Interest Act, Chapter 31 (Section 2.2-3100 et. Seq) of Title 2.2.